

Rabobank/Microsoft collaboration

Developing a new way of working

Do you remember the first time you used a computer at work? How about your first e-mail? Or the first time you used the Internet and thought this just might be something important for business? The moment your ICT was fancier at home than at work? What about the first time you worked from home, your first video chat, or Twitter or Yammer message?

Because we live in a changing world, Rabobank is changing to a new way of working. We are looking to become an organisation in which every employee can work at any time and in any place, where there are no fixed desks at the office, executives included. Where the office is suitable for all kinds of individual and collaborative work, and where employees assume full responsibility for their output and actions.

The necessity of change. Rabobank customers are increasingly well educated, lead a variety of lifestyles and are ageing. This affects our relationship with them. They have increasingly high service expectations: 24-hour access and customer service, the latest banking information at all times. They want personal financial advice about complex products and transactions. At the same time, loyalty is decreasing for a variety of reasons, including the increasing number of providers of banking products and the ease of switching banks.

Our staff is also changing and tend to be higher educated, we have less administrative work and results are more dependent of collaboration. Younger employees in particular tend to mix their work and private lives and have a greater tendency to switch employers.

With this change from a product-focused to a service-focused organisation, the need to be flexible and competitive, tightness in the job market and scarcity of talent, the old command and control management style and the old cubicle office are simply no longer suitable if we are to remain competitive all-round.

With these new challenges, Rabobank can continue to be an attractive employer. As well as a business relationship, employees increasingly value an emotional and social connection with the organisation. And while less attached to the organisation than perhaps ten or twenty years ago, employees still have a desire to belong and to be proud of the

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organisation for which they work. We can therefore offer freedom of choice regarding employment terms and conditions as well as career development. This has an impact on both winning the loyalty of talented employees who perform well, and on attracting new staff.

The unplugged programme. In response to these challenges, and therefore to be an agile and flexible organisation, Rabobank introduced the unplugged programme in 2005. Throughout the programme, the focus is on the way we work and not on what we do. We are still a bank, delivering financial services to our customers, and we are one of the leading innovators in what we do. Unplugged is about how we do it. The name is derived from the MTV series where musicians show what they have to offer acoustically, without the aid of electrical equipment. This is what we also wanted to achieve in the way we worked: people who are visible, authentic and able to perform. The programme consists of four interconnected subprogrammes.

Physical environment. In our work, we have different kinds of activities: individual work where the staff has to be totally focused and concentrated, for example when writing a document. There's individual

Focus on Rabobank

International service provider on a cooperative organisation principle

- Operating in 48 countries
- Retail banking, wholesale banking, asset management, leasing and real estate
- 9.5 million customers around the world
- 624 offices outside the Netherlands
- 59,000 FTEs

Cooperative core business: 147 independent Rabobank member banks in the Netherlands

- 7.5 million customers
- 1,010 offices
- 29,000 FTEs

The highest credit rating by S&P, Moody's and DBRS

- Triple A since 1981

work with a bit of interaction, such as working on e-mail. We work together in small groups with a large amount of interaction, like in brainstorm sessions. And then there's collaboration in medium groups with medium interaction such as discussing progress with a project team, or collaboration in large groups with little interaction, such as a presentation.

We have created an office that facilitates these different activities in different kinds of workspaces. The office building is rich in facilities and cleverly designed, people move through it at will to find a place that suits their activity, and nobody has his or her own permanent office. Not one size fits all, people simply use the workspaces that are suitable for the activity at hand.

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Virtual environment. To be able to work at any time and in any place, be it in or outside the office building, we supply everybody with a laptop or tablet computer, and a smartphone. The building is equipped with a wireless LAN, while outside the building you can connect to your mail and data through a VPN or Citrix connection.

To facilitate collaboration we have introduced chat (communicator), one-to-one and one-to-many videoconferencing, SharePoint for sharing documents, and virtual collaboration.

Human resources environment. Because with the new way of working people become entrepreneurs within the company, assuming personal responsibility for their results, collaboration and time and place of work, we changed the tone of voice in our recruiting procedures and have given our employees greater freedom in terms of employment. The system for performance management is focused more on results instead of on the way in which they are achieved, and the administrative procedures have been digitalised in a self-service format.

Transformation. An essential component in the shift towards the new working style is how staff at Rabobank adopt and use the new facilities and change their style of working accordingly. This includes matters such as looking at their work routines and deciding whether they can change them, or stopping having regular meetings that are more of a ritual than actually achieving effective results. The work has become almost paperless, activity-related, and requires a laptop instead of one's own desk. The three environments come together in the transformation process. If you can work in any place and any time, it's important to



authorise your colleagues with respect to your agenda and to be transparent about where and when you are working. As a manager, it's about not sticking religiously to an office but rather about being an example in activity-related working.

Change strategy. Because the objective is to be a flexible organisation where people make their own choices based on entrepreneurship, responsibility and fewer rules, the change strategy is inviting instead of a top-down roll-out. People and departments are invited to take part in the transformation to the new working style and to formulate the goals they want to reach. In that way they can be the architects of their own transformation. If they wish, the building blocks can be passed on to them in the form of workshops, newsletters, presentations, courses and manuals. Moreover, the regular staff departments HR, health, ICT and housing are ready to help them in their change process. This ensures that the change strategy is consistent with the desired organisational culture.

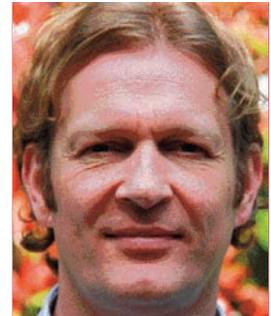
Where in a traditional office everybody has their own desk or room, in an activity-based office where workplaces are shared, a rate of seven desks for ten people is sufficient.

Cost-effective. Although it is not the main objective, the concept behind the new way of working is also cost-effective. Because the office is a shared workplace, the occupancy rate is higher. Where in a traditional office everybody has their own desk or room, in an activity-based office where workplaces are shared, a rate of seven desks for ten people is sufficient. Therefore we need only 70% of the normal office space and also save on management costs for cleaning, heating and so on. Because the office space is fixed and people move through it, the costs for moving and redecorating are lower. More importantly, projections are that absenteeism will decrease and customer and employee satisfaction and innovation will rise. ■

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Enabling the new way of working

Rabobank and Microsoft Netherlands share the same ideas on the new way of working and the two organisations are acting on identical drivers. In fact, they've been working together on these ideas for quite some time.



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So, looking at the new Rabobank and Microsoft work styles, do you believe that the use of technology is optional? At the same time, is technology a goal in itself or “just” an enabler? And if it is an enabler, how do you make sure it enables in the most optimal way?

Please note that for Microsoft Netherlands, there is one important so-called meta-driver for the new way of working and the use of technology: “to practice what we preach” –using Microsoft technology to transform our workplace, improve our appeal to new employees as well as increase employee retention rate and revenue.

The new way of working and technology. Some of the most important principles of the Rabobank and Microsoft work styles are:

- to be able to work at any place and any time, where and when one is most productive;
- collaborating with others within and outside the organisation.

Technologies enable tangible and practical improvements in the way people work, from communicating to participating in meetings and capturing knowledge and information. Because if people want to work according to the principles of the new way of working, they should be able to work anywhere and anytime as if they were in the office. They need tools to optimise their work individually and in teams. Tools to communicate in a “unified” way, which make it easy to escalate from a simple instant message to rich forms of communication like voice, video and desktop sharing. And tools to share and collaborate on documents, to start approval or review workflows and to find the right information for people to do their work right.



Making technology relevant for the new way of working.

As such, organisations like Rabobank and Microsoft discuss how to best realise the full potential of new software products or how to teach employees the best way to integrate new technologies, tools and services into their work routines.

A very useful approach for end users to develop both the mental and technical readiness required for Rabo Unplugged is the application of “personas” and “scenarios”.

The concept of personas provides insight into typical groups of people within an organisation that have similar work styles and identical tasks, appointments and activities during their work week. Also the use of technology, the needed skills and engagement rules are described.

A typical persona includes the following items:

- personal information: gender, marital status, and so on;
- demographic information: in what places or locations people can perform their tasks;
- work style: the high-level goals of the persona and how these workers perceive the job;
- week in the life: a calendar of a typical week with tasks, appointments and activities.

A scenario describes how a future activity should be conducted to become more effective, mainly by eliminating inefficiencies in the process. The purpose of a scenario is to communicate the alignment between business activities, the skills required for workers to achieve

Focus on Microsoft Netherlands

Head quartered at Schiphol Airport near Amsterdam.

About 950 employees with 650 flexible working spaces (about 70% utilization).

All employees have are provided with a laptop of tablet pc, smartphone, headset, webcam, external keyboard & mouse, and smartcard for physical and virtual access.

99% of all processes are fully digital and paperless.

their goals and the technology platform. Scenarios are all about rationalising and standardising common, everyday activities such as meetings, communication, e-mail, and project tasks with the goal of making each activity more effective.

A typical scenario includes the following items:

- description and storyboard: a brief description of the tasks involved;
- rules of engagement: a set of rules that govern the use of the scenario;
- skills: the skills required to be successful;
- technology: the required technology capabilities;
- workplace: where the scenario's activities take place.

A good example of a scenario is "smarter meetings". It provides guidelines and helps identify key ways to organise and execute meetings more effectively by employing technology such as e-mail and collaboration suites. This is where the use of technology has become relevant.

To determine what scenarios to develop, it's important to focus on the activities that consume the most time for workers within the organisation. Other typical examples of activities that often need optimisation are: running projects, communicating in general, knowledge and information sharing, and doing e-mail and tasks.

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What technology are we talking about? Rabobank (like Microsoft) uses different Microsoft technologies to support Rabobank Unplugged, the bank's implementation of the new way of working. Some of these are:

- Microsoft Office SharePoint for collaboration and search;
- Microsoft Office Communications Server and Live Meeting for Presence, Instant Messaging, Audio, Video and Conferencing;
- Microsoft Outlook and Exchange Server for E-mail, Voicemail and Calendar.

When you bring the "Smarter Meetings" scenario and the use of Microsoft technology together, this is roughly what it would look like:

To plan a meeting with one or more people, Gérard opens Outlook and starts inviting people (Raimond, Sjoukje and Paul) by typing their names in the new meeting request. To check availability the Scheduling Assistant is opened. This makes it possible in Outlook



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to open all calendars of all invited persons and to find a date and time when all invitees are available. However, to understand a particular calendar item well to determine if the time slot can be used for Gérard's meeting, Gérard starts an instant message (IM) conversation (chat) from within the meeting request with Sjoukje. This opens the Office Communicator client. Sjoukje's presence status is "available" so it is very likely she will respond immediately. In the instant message conversation Sjoukje and Gérard chat on possible time slots for the meeting. It turns out that with typing many long instant messages it's better to actually talk to each other. Gérard escalates from the IM to voice by simply clicking a button. When the date and time of the meeting is determined, Gérard automatically adds conference details in the meeting request by clicking the "Live Meeting" button. This enables one or more of the invitees to join the meeting in a virtual manner with voice, video and sharing content if needed. This virtual meeting is hosted by Office Communications Server.

Another thing Gérard does is to automatically create a meeting workspace by clicking "Meeting Workspace" in the request. This creates a SharePoint meeting site where objectives, agenda, action items and relevant reading materials (documents) can be shared with all invitees to prepare the meeting before it starts. In the meeting request a link to the meeting workspace is generated and added. In the meeting workspace will be put all the decisions and other action items recorded during the meeting.

At this time Gérard can send out the "smart" meeting request that holds all the relevant information as mentioned to have a structured and well-prepared meeting with the proper follow-up. ■

All the technologies mentioned are part of the Microsoft Business Productivity Platform. Please find more information on www.microsoft.com/businessproductivity.